

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Atty Roberts, Gregory, of Barrus & Roberts (for Petitioners Pedro Cervantes and Susan Cervantes)

(1) First and Final Account and Report of Guardian and Petition for Its Approval; (2) for Allowance of Attorney's Fees and Costs; (3) Discharge or Guardian of Person; and (4) Authority to Deliver Assets

Age	e: 19 years		PEDRO CERVANTES and SUSAN	NEEDS/PROBLEMS/COMMENTS:
DO	B: 8/9/1992		CERVANTES, maternal grandparents and Co-	
			Guardians of the Person and Estate appointed on	
			1/7/1999, are Petitioners.	
Cor	nt. from		A 1 1/7/1000 0/0/2010	
	Aff.Sub.Wit.		Account period: 1/7/1999 – 8/9/2010 Accounting - \$173,712.00	
√	Verified		Beginning POH - \$131,531.20	
<i>'</i>			Ending POH - \$173,712.00 (all cash)	
Ě	Inventory		Δilding 1 O11	
	PTC		Co-Guardians - waive	
	Not.Cred.		, , , , , , , , , , , , , , , , , , , 	
✓	Notice of		Attorney - \$1,400.00	
	Hrg		(per Declaration, which includes 1 hour estimated	
✓	Aff.Mail	W/	for attorney's review of documents and attendance	
	Aff.Pub.		at hearing)	
	Sp.Ntc.			
	Pers.Serv.		Attorney Costs - \$421.00	
	Conf. Screen		(filing fees and certified copies)	
	Letters		Petitioners state they received a check from Thrift	
	Duties/Supp		Savings Plan [from the ward's deceased mother's	
	Objections		participation via her former employer] for	
	Video		\$10,769.85, and without realizing the funds were to	
	Receipt		go into a blocked account, the Petitioners used the	
	CI Report		funds to purchase bedroom furniture, clothing and to	
	9202		pay for medical bills of the minor; these funds were	
✓	Order		mistakenly not placed in a blocked account and not	
	Aff. Posting		kept track of as part of the guardianship account, as	Reviewed by: LEG
	Status Rpt		these funds went directly to Petitioners and not	Reviewed on: 2/17/12
	UCCJEA		through their counsel's office (please refer to Declaration of Susan Cervantes filed 1/9/2012.)	Updates:
	Citation		Declaration of Susan Cervanies filea 1/9/2012.)	Recommendation:
	FTB Notice		~Please see additional page~	File 1 - Strickland

Declaration of Susan Cervantes filed 1/9/2012 states she did not realize the Thrift Savings Plan funds she was using were to be held in a blocked account; that she and the Co-Guardian have purchased things for the minor over the years and the costs have far exceeded the **\$10,769.85**; and she apologizes to the Court for the error.

Declaration of Jordan Strickland filed 1/9/2012 states he went to CITIBANK after his 18th birthday and requested to withdraw money from his account, and the bank allowed him to open a personal account and transfer money from the guardianship account into a checking account; he is the only person who has withdrawn money from the account, and his grandparents and court-appointed Guardians have not taken any money from the account; he also went to CHASE bank to withdraw his money and that bank told him he needed a court order and would not release any money to him without a court order; he did not know that he could not use the money or take the money out of the accounts without a court order; he apologizes to the Court if he has done anything wrong, as he thought the money was his and that he could use it how he wanted.

Petitioners request that the guardianship be terminated as the former ward attained the age of 18 years on 8/9/2010; Petitioners request that they be discharged as Guardians of the Person and Estate of the former ward.

Petitioners pray for an Order:

- 1. Settling and allowing the First and Final Account and report and confirming the acts of the Petitioners and Guardians of the Estate for the account period;
- 2. Authorizing Petitioners to pay the attorney fees and reimbursement of costs advanced;
- 3. Discharging the Petitioners as Guardians of the Estate; and
- 4. Authorizing Petitioners to deliver the property remaining in their possession to Jordan Everett Strickland, and to facilitate this delivery, authorizing the unblocking of the Chase bank account and the Citibank account.

2 Maria Lozano (Estate)

Case No. 06CEPR01225

Atty Cross, Robert W. M., sole practitioner of Selma (for Petitioner Irma Lozano, Administrator)

(1) Second and Final Account and Report of Administrator and Petition for Its Settlement, (2) for Allowance of Compensation to Attorney for Ordinary Services, and (3) for Final Distribution (Prob. C. 10902 and 10950)

—	and (5) for timal distribution (F10b. C. 10902 and 10950)					
DO	D: 10/11/2003	IRMA LOZANO , daughter and Administrator with Full	NEEDS/PROBLEMS/COMMENTS:			
		IAEA without bond appointed on 1/2/2007, is Petitioner.				
			4 87 1 1 1			
		Account period: 1/11/2011 – 1/23/2012	1. Need proposed order.			
		Accounting - \$215,500.00				
Cor	nt. from	Beginning POH - \$215,500.00				
	Aff.Sub.W	Ending POH - \$ 13,258.64 (all cash)				
✓	Verified					
✓	Inventory	Administrator - waives				
√	PTC	=				
—	Not.Cred.	Administrator's Claim - \$6,673.54				
√	Notice of	(partial payment of \$20,549.49 Creditor's Claim				
	Hrg	documented in Attachments 1 through 6 to the First Account				
	Aff.Mail W					
É	Aff.Pub.	insurance, utilities/water/power, house maintenance/yard,				
	Sp.Ntc.	and funeral expenses;)				
	Pers.Serv.	=				
 		Attorney - \$4,500.00				
	Conf. Screen	(less than statutory of \$7,310.00)				
-	Letters 01020					
-	Duties/S	Costs - \$2,085.10				
-		(filing fees, certified copies, publication, probate referee,				
-	Objections	appearance fee in litigation matter;)				
	Video					
-	Receipt	Petitioner states:				
	CI Report	• During the period of the account, Petitioner sold the real				
✓	9202	property residence in Selma for \$75,000 (Seller's Final				
	Order X	Closing Statement attached as Exhibit B), on 6/15/2011				
	Aff. Post	after years of having the property on the market; the sale	Reviewed by: LEG			
	Status Rpt	price was fair even though much less than the valuation	Reviewed on: 2/21/12			
	UCCJEA	of \$215,000 , and the sale was proceeded by <i>Notice of</i>	Updates:			
	Citation	Proposed Action to all heirs;	Recommendation:			
✓	FTB Notice	Petitioner also settled all claims of the Department of	File 2 - Lazono			
		Health Services for the discounted amount of \$50,000				
		[Dismissal of Creditor's Claim and Withdrawal of				
		Request for Special Notice was filed on 7/5/2011];				
		~Please see additional page~				
<u>Ц</u>	<u> </u>	F	II.			

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Additional Page 2, Maria Lozano (Estate)

Case No. 06CEPR01225

Petitioner states, continued:

- Petitioner paid out of her own funds \$1,400 to settle an individual's claim against the estate;
- Petitioner submitted a claim against the estate for \$20,549.49, documented in full as *Attachments 1 through 6* to the *First Account and Report* filed 1/11/2011 [Order Settling First Account and Report of Administration was signed 4/7/2011]; Petitioner was not reimbursed at the time of the first account, and requests \$6,673.54 of the total amount she expended be reimbursed to her;
- While Petitioner has made other payments in the last year on behalf of the estate, she is not seeking reimbursement for any of those expenditures; there are insufficient funds to reimburse her for the expenditures;
- Items of household furniture valued at \$500.00 on the *Inventory and Appraisal* were not realistically saleable and so were given to heirs who wanted them and were in position to take them;
- There will be no distribution to any of the Decedent's heirs because [there are insufficient funds], even with the waiver of compensation by Petitioner as Administrator, a significant reduction in attorney's fees for the probate action, and no charging of attorney's fees in connection with the separate lawsuit with the Department of Health Care Services [10CECG02260].

Petitioner prays for an Order:

- 1. Settling, allowing and approving the *First Account* of Petitioner as Administrator, and confirming and approving all acts and proceedings of Petitioner as Administrator;
- 2. Authorizing and directing Petitioner to pay the attorney's compensation of \$4,500.00 and reimbursement of \$2,085.10 costs advanced by the attorney;
- 3. Authorizing Petitioner to pay herself \$6,673.54 as satisfaction of her claim as creditor of the estate;
- 4. Distributing any other property of Decedent or the estate not now known or discovered to the persons entitled to it, Decedent's children, as follows: 1/5th each Eugenio Lozano, Rosanelia Garcia, Richard Lozano, Mary Helen Jasso, and Irma Lozano; and
- 5. Discharging and releasing Petitioner from all liability to be incurred hereafter upon the filing of receipts [Examiner added: and approval of an Ex Parte Petition for Final Discharge and Order.]

3 Erika Hernandez, Logan Hernandez, & Jaydin Hernandez (GUARD/P) Case No. 08CEPR01188

Atty Hernandez, Teresa (pro per Guardian)
Atty Attashian, Zepure (for Petitioner/mother Eliza Frausto)

Respondent's Notice of Motion and Application to Reconsider and Revocation of Order Re: Supervised Visits, and Retroactive Stay of Proceedings, Alternatively, a Request to Participate in Court Investigation Regarding Modification of Visitation, Memorandum of Points and Authorities and Declaration of Respondent in Support

Erika age: 7 years DOB: 9/21/04	ELIZA FRAUSTO, mother, is petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Logan age: 5 years DOB: 2/25/07	TERESA HERNANDEZ , paternal grandmother, was appointed guardian on 2/9/2009.	1 Need Nation of Haming
Jaydin age: 3 years DOB: 7/28/08 Cont. from Aff.Sub.Wit. ✓ Verified Inventory PTC Not.Cred. Notice of X Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv.	Petitioner requests this Court reconsider its order of 1/4/2012 modifying the visitation. Petitioner states on 5/21/2009, the Guardian Teresa Hernandez filed and served a Citation and Petition to Declare the Minors Free from mother's custody (case nos. 09CEFL03194, 03199, 03200). The petition to terminate the mother's parental rights is pending. On January 4, 2012 mother states she appeared in this court on a Petition to Modify the Guardianship Visitation Orders from unsupervised to supervised. The Court, unaware of the pending Petition to Declare the Minor Child Free from Mother's Care, modified the visitation orders.	 Need Notice of Hearing. Need proof of service of the Notice of Hearing on: Teresa Hernandez (guardian/paternal grandmother) Note:
Conf. Screen Letters Duties/Supp	Petitioner alleges as a result of the pending termination, the guardianship orders are stayed and cannot be modified. Accordingly she is requesting the Court vacate its 1/4/2012 order and reinstate the previous visitation orders pending	
Objections Video Receipt CI Report	resolution of the pending termination of her parental rights. Alternatively, Petitioner asks that the court refer Teresa (guardian) and mother to an additional assessment with a Court	
9202 Order X Aff. Posting	Investigator. Mother alleges the current visitation order providing her with supervised visits only, are unjustified.	Reviewed by: KT
Status Rpt UCCJEA Citation	Petitioner states during their last few visits the children have been begging her to take them home for the visits. They are not comfortable with Teresa supervising the visits. Petitioner states	Reviewed on: 2/21/12. Updates: Recommendation:
FTB Notice	the children's safety, health and wellbeing are her first priority.	File 3 - Hernandez

4 Robert Leon Powell (Estate)

Case No. 10CEPR00298

Atty Cross, Robert W. M., sole practitioner of Selma (for Petitioner Rebba Workmon)

(1) First and Final Report of Executor on Waiver of Account and (2) Petition for Allowance of Compensation to Attorney for Ordinary Services and for (3) Final Distribution

DO	D: 6/1/2009	REBBA WORKMON, daughter and Executor with Full IAEA	NEEDS/PROBLEMS/
		without bond appointed on 5/18/2010, is Petitioner.	COMMENTS:
		Accounting is waived.	1. Proposed order
L			does not comply
Coı	nt. from	I & A - \$312,007.29 POH - \$286,071.57	with Local Rule
	Aff.Sub.W	(\$284,451.57 is cash)	7.6.1(A) providing
✓	Verified		that monetary distributions must
√	Inventory	Executor - waives	be stated in dollars,
✓	PTC	Attorney - \$5,500.00	and not as a
—	Not.Cred.	(less than statutory of \$9,240.15; Note: Petition calculates statutory	percentage of the estate. Need revised
\	Notice of	fees based upon a loss on the sale of the real property; no loss should	proposed order
./	Aff.Mail W	be included, as payment of seller's costs are not considered a loss;)	containing the
V	Aff.iviali W /0	Costs - \$1,152.40	dollar amount to be
	Aff.Pub.	(filing fees, probate referee, publication, certified copies)	distributed to each distributee, along
	Sp.Ntc.	D-4'4'	with the percentage
	Pers.Serv.	 Petitioner states: Petitioner took the following actions with close communication 	to each of the Note
	Conf.	with CAROLYN E. KENDRICK , the other distributee: sold	secured by Deed of Trust.
	Screen	motor home for its inventoried value of \$100; sold pickup truck	11 ust.
	Letters 051810	for its inventoried value of \$13,000 to Carolyn Kendrick by	
	Duties/Supp	receipt in the estate of \$5,000 cash and by receipt of the Petitioner of an old tractor; Petitioner and Carolyn Kendrick disposed of	
	Objections	other personal property jointly by mutual agreement;	
	Video	• Petitioner sold the real property residence located at 6726 E.	
	Receipt	Clarkson in Selma for its appraised value of \$160,000 in July	
	CI Report	2011 following service of <i>Notice of Proposed Action</i> and written consent of Carolyn Kendrick;	
\ <u>\</u>	9202	 A Note with an inventoried value of \$4,110.67 secured by a Deed 	
Ľ	Order Aff. Posting	of Trust on the real property located at 15528 S. Hughes has now	Reviewed by: LEG
	Status Rpt	been paid down to \$1,619.95 with continuing monthly payments	Reviewed by: ££6
\parallel	UCCJEA	of \$100 .	Updates:
	Citation	Distribution pursuant to Decedent's Will is to:	Recommendation:
✓	FTB Notice	• REBBA WORKMON – [\$138,899.59 cash] and 50% interest in	File 4 – Powell
		the Note secured by Deed of Trust on real property located at	
		15528 S. Hughes; • CAROLYN E. KENDRICK – \$138,899.59 cash] and 50%	
		interest in the Note secured by Deed of Trust on real property	
		located at 15528 S. Hughes.	

Atty

Moore, Susan L. (for Petitioner/Administrator Michael W. McNiff)

(1) Petition for Settlement on Waiver of Account; (2) Petition for Final Distribution and for (3) Allowance of Compensation for Ordinary Services

DC	D: 5/27/2010	MICHAEL W. McN	IFF.	NEEDS/PROBLEMS/COMMENTS:
		Administrator, is petit	*	
		, 1		
		Accounting is waived		Note: Attorney made a math error in the
Со	nt. from	Č		calculation of statutory attorney fees.
	Aff.Sub.Wit.	I & A -		The correct amount for statutory fees is
1	Verified	\$160,000.00		\$5,957.50 and not \$6,957.50 as listed in the petition and the order. The attorney
√	Inventory	РОН -	\$ 61,002.88	has agreed to accept \$4,000.00 as her fee for ordinary services, therefore
✓	PTC	Administrator -	waives	distribution is not affected. Examiner has interlineated the order to reflect the
√	Not.Cred.			correct amount of statutory fees.
✓	Notice of Hrg	Attorney - (less than statutory)	\$4,000.00	
	Aff.Mail	(1035 than statutory)		
	Aff.Pub.	Distribution, pursua	nt to intestate	
	Sp.Ntc.	succession, is to:		
	Pers.Serv.	Succession, is con		
	Conf. Screen	Michael W. McNiff -	\$19,000.96	
✓	Letters 10/18/10	Mark McNiff -	\$19,000.96	
	Duties/Supp	Richard McNiff -	\$19,000.96	
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 2/22/12
	UCCJEA	_		Updates:
	Citation			Recommendation: SUBMITTED
✓	FTB Notice			File 5 - McNiff

Atty Atty Atty

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Roberts, Gregory J., of Barrus & Roberts (for Petitioner Gail Brown, Successor Trustee)
Bagdasarian, Gary G., sole practitioner (for Objectors Anna Hinley and Frances Albers)
Lind, Ruth P., sole practitioner (for James Louis Roberts, Executor of the Estate of Chester Beeler)

First Account of Trustee, Report of Trustee, Confirmation of Payment to Creditors and Allowance of Payment to Creditors, Fixing of Trustee's Compensation, and Approving Payment of Attorneys Fees and for Preliminary Distribution (Prob. C. 17200)

Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Attorney Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report Pide Order Aff. Posting Ending POH - \$483,142.55 (\$316,836.16 is cash) Trustee - \$13,502.96 or \$13,000.00? Trustee's fees, whithe calculation for preliminary distributions dedu an even \$13,000.00 Trustee's fees. \$10,000.00 Frustee's fees. \$10,000.00 Trustee's fees. \$10,000.00 Trustee's fees. ### Description of any federal and state income taxes owed by the estate, accounting fees, closing expenses, additional attorney and trustee fees, and any other liabilities determined to be due from the trust estate;) Petitioner states: Distribution terms of the Trust are set forth in Sections 4.03(a), (b), (c) and (d); subsections (a) and (d) were not amended, but subsection (b) was amended by the 3rd Amendment, and subsection (c) was amended by the 2rd Amendment to the Trust; Distribution terms of the Trust and Will were modified by the agreement reached between the participating in a settlement conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist	Γ			1/200)	
Petitioner Pet				GAIL BROWN, niece and Successor Trustee appointed on	
Account period: 11/17/2010 - 1/15/2012 Accounting - \$525,148.04 Beginning POH - \$523,271.40 Ending POH - \$483,142.55 S316,836.16 is cash) Trustee \$13,502.96 or \$13,000.00 ?				11/17/2010 with all cash to be deposited in blocked accounts, is	COMMENTS:
Account period: 11/17/2010 – 1/15/2012 Accounting - \$525,148.04 Beginning POH - \$523,271.40 Ending POH - \$4483,142.55 [\$316,836.16 is cash] Trustee - \$13,502.96 or \$13,000.00? PTC Not.Cred. Attorney - \$19,032.93 Attorney - \$10,000.00 (for payment of any federal and state income taxes owed by the estate, accounting fees, closing expenses, additional attorney and trustee fees, and any other liabilities determined to be due from the trust estate;) Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order X Aff. Posting Status Rpt UCCJEA Citation Accounting - \$525,148.04 Fedining POH - \$433,142.55 (\$316,836.16 is cash) Trustee's fees, whithe calculation for preliminary distributions dedu an even \$13,000.00 Trustee's fees. Note: Paragraph 1 the Petition reques \$13,502.96 for Trustee's fees, whithe calculation for preliminary distributions dedu an even \$13,000.00 Trustee of the Trust are set forth in Sections 4.03(a), (b), (c) and (d); subsections (a) and (d) were not amended, but subsection (b) was amended by the 2 nd Amendment to the Trust; Distribution terms of the Trust and Will were modified by the agreement reached between the parties participating in a settlement conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Recommendation:		_		Petitioner.	
Accounting - \$523,271.40 Aff.Sub.Wit. Signature Signature	DO	D: 4/2/2010			
Cont. from					oraer.
Aff.Sub.Wit. ✓ Verified Inventory PTC Not.Cred. ✓ Notice of Hrg Aff.Pub. Aff.Pub. Letters Conf. Screen Letters Duties/Supp Objections Video Receipt Ci Report 9202 Order Aff. Posting Status Rpt UCCIEA Citation Aff. Posting Status Rpt Letters Citation Aff. Posting Aff. Posting Status Rpt Letters Citation Aff. Posting Aff. Posting Aff. Posting Aff. Posting Aff. Posting Citation Aff. Posting Aff. Posting Aff. Posting Aff. Posting Aff. Posting Status Rpt Petitioner six discussion (a) administer the Trust pursuant to the agreement of the agr					
Aff.Sub.Wit. ✓ Verified Inventory PTC Not.Cred. ✓ Notice of Hrg Aff.Mail W / Estate, accounting fees, closing expenses, additional attorney and trustee fees, and any other liabilities determined to be due from the trust estate;) Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order X Aff. Posting Status Rpt UCCIEA Citation Aff. Sub.Wit. ✓ Verified - \$433,142.55 (\$316,836.16 is cash) Trustee's \$13,502.96 for \$17.000.00 ? Trustee's fees, with the calculation for preliminary distributions dedu an even \$13,000.00 Trustee's fees. ### Trustee fees, and any other liabilities determined to be due from the trust estate;) Petitioner states: • Distribution terms of the Trust are set forth in Sections 4.03(a), (b). (c) and (d); subsections (a) and (d) were not amended, but subsection (b) was amended by the 2 nd Amendment to the Trust; Distribution terms of the Trust and Will were modified by the agreement reached between the parties participating in a settlement conference for the Probate Estate matters (Case 10 CEPR00104); however, the distribution terms of the Trust and will were modified by the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Reviewed by: LEG Reviewed by: LEG Reviewed on: 2/21, Updates: Recommendation:	Coı	nt. from			Note: Paragraph 13 of
Trustee \$13,502.96 or \$13,000.00 ?		Aff.Sub.Wit.			the <i>Petition</i> requests
Inventory	✓	Verified		(\$316,836.16 is cash)	7
PTC				#12 F02 07 #12 000 00 9	Trustee's fees, while
Notice of Hrg		-	l I	1 rustee - \$13,502.96 or \$13,000.00?	
Notice of Hrg		_	<u> </u> 	Attomay \$10,022,02	
Reserve			<u> </u>	Auomey - \$19,032.93	an even \$13,000.00 for
Aff.Mail W Aff.Pub. Sp.Ntc. Sp.Ntc. Ders.Serv. Conf. Screen Letters Duties/Supp Objections Objections Objections Ocitation Order X Aff. Posting Status Rpt UCCJEA Citation Citation	🗸			Reserve - \$10,000,00	,
Aff.Pub. Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt OCITATION Aff. Posting Status Rpt Citation Aff. Pub. Aff. Posting Citation Aff. Pub. Aff. Posting Estate, accounting fees, closing expenses, additional attorney and trustee fees, and any other liabilities determined to be due from the trust estate;) Petitioner states: Distribution terms of the Trust are set forth in Sections 4.03(a), (b), (c) and (d); subsections (a) and (d) were not amended, but subsection (b) was amended by the 2 nd Amendment to the Trust; Distribution terms of the Trust and Will were modified by the agreement reached between the parties participating in a settlement conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Recommendation:			<u> </u>		
Aff.Pub. trustee fees, and any other liabilities determined to be due from the trust estate;	🗸	Aff.Mail	W /		
Sp.Ntc. Petitioner states:		Aff Dub	<i>'</i>	e v	
Petitioner states: Conf. Screen Duties/Supp Objections Video Receipt CI Report Order Aff. Posting Status Rpt Citation Petitioner states: Distribution terms of the Trust are set forth in Sections 4.03(a), (b), (c) and (d); subsections (a) and (d) were not amended, but subsection (b) was amended by the 3 rd Amendment, and subsection (c) was amended by the 2 nd Amendment to the Trust; Distribution terms of the Trust and Will were modified by the agreement reached between the parties participating in a settlement conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Reviewed by: LEG Reviewed on: 2/21, Updates: Recommendation:				· · · · · · · · · · · · · · · · · · ·	
Conf. Screen	-	•	<u> </u>		
Letters			1	Petitioner states:	
Duties/Supp subsection (b) was amended by the 3 rd Amendment, and subsection (c) was amended by the 2 nd Amendment to the Trust; Distribution terms of the Trust and Will were modified by the agreement reached between the parties participating in a settlement conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; UCCJEA		Conf. Screen		• Distribution terms of the Trust are set forth in Sections 4.03(a), (b),	
Citation		Letters			
 Video Receipt CI Report Page of the parties participating in a settlement conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P.		Duties/Supp			
Video agreement reached between the parties participating in a settlement conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; UCCJEA Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Recommendation:		Objections			
CI Report conference for the Probate Estate matters (Case 10CEPR00104); however, the distribution terms of the Trust as amended are set forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Recommendation:		Video		· ·	
CI Report		Receipt			
9202 forth in this Petition, and they are different than what was agreed to by the parties at the settlement conference because the agreement was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; UCCJEA		CI Report			
Order X		•		forth in this <i>Petition</i> , and they are different than what was agreed to	
Aff. Posting Status Rpt UCCJEA Citation Was never signed, and the Executor of the Estate of Chester P. Beeler, JAMES LOUIS ROBERTS, Pastor of West Park Baptist Church, has not followed the agreement of the parties; Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Reviewed by: LEG Reviewed on: 2/21 Updates: Recommendation:		Order	Х		
Status Rpt UCCJEA Citation Citation Church, has not followed the agreement of the parties; Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Recommendation: Reviewed on: 2/21 Updates: Recommendation:					Reviewed by: LEG
UCCJEA Petitioner is willing to administer the Trust pursuant to the agreement if Executor James Roberts is willing to administer the Recommendation: UCCJEA					Reviewed on: 2/21/12
Citation agreement if Executor James Roberts is willing to administer the Recommendation:		·			
					•
		2			
~Please see additional page~				~Please see additional page~	

First Additional Page 6, Chester & Lorene Beeler (Trust) Case No. 10CEPR00880

Petitioner states, continued:

- Pursuant to an ex parte petition and order of the Court, the Trustee paid several medical services creditors, including Golden Living Center care facility, for a total sum of \$6,993.28;
- There are 4 creditors that have not been paid, consisting of the Petitioner and persons related to the Petitioner; Petitioner seeks Court approval to pay the following claims totaling \$29,106.15:
 - \$3,118.00 to ERIC BROWN [relationship to the Decedent or Petitioner unstated], for medical bills and lost wages due to injury sustained while working at the Beeler property getting it ready for sale; medical bill was \$118.00, and he was unable to work for 10 days at his job as a self-employed plumber making \$600.00 per day, thus Mr. Brown claimed lost wages of \$6,000.00 for 10 days work; Trustee agreed to settle the claim for \$3,000.00 plus the medical expenses (please refer to Exhibit 1 for copy of written request to Trustee and copy of urgent care medical evaluation and bill);
 - \$12,750.45 to GAIL BROWN (Trustee, niece) and \$9,396.38 to DONNA WYATT [relationship to the Decedent or Petitioner unstated], for the care of Chester and Lorene for ~8 months by Donna, who understood that she was to be compensated for her work; and for the care of Lorene after Chester's death, as it is specifically stated in Chester's Will that Gail is to be paid and compensated for taking care of Lorene after Chester's death; Gail and Donna paid bills with their own funds and took care of the Beelers (please refer to Exhibits 2 and 3 for summaries of their work and receipts for expenses);
 - \$3,841.32 to LANCE ARMO, Attorney for Donna Wyatt and Gail Brown in the initial probate proceedings and the will contest until Petitioner Gail Brown's current attorney substituted in; Petitioner paid Mr. Armo \$2,725.00 and Mr. Armo claims a balance due of \$1,116.32 (please refer to Exhibit 4 for copies of his invoices); Petitioner requests to be reimbursed the amount she has paid, and for approval to pay the balance due to Mr. Armo.
- After a *Notice of Proposed Action* was mailed to all interested parties on 11/5/2010, and no objections were received, the Trustee sold the real property at 6205 W. Dudley in Fresno for \$190,000.00, with escrow closing on 1/13/2011; proceeds from the sale deposited into the blocked estate account totaled \$154,987.79;
- The Trust is a beneficiary of the Probate Estate (Case 10CEPR00104) and should receive funds in excess of \$100,000; no funds have yet been received from the Probate Estate;
- Trustee will pay taxes that become due, and Trustee has paid expenses of Trust administration except for claims of Eric Brown, Gail Brown, Donna Wyatt, Lance Armo, and Trustees and attorney's fees;
- The Trust does not specify the Trustee's compensation; pursuant to Probate Code § 15681, the Trustee is entitled to reasonable compensation, which Petitioner believes to be \$13,502.96 computed on a fee base of \$525,148.04 for services similar to that performed by an executor of an estate;
- Petitioner's attorney has rendered services on behalf of the Trust administration and of the related probate petitions; services through 12/31/2011 and costs advanced (of \$557.62) total \$19,032.93 (please refer to Exhibit 6 for Declaration in Support of Request for Compensation for Attorney's Services, stating in part: on 8/3/2010 the parties attended a settlement conference with Judge Kazanjian at which it was agreed that Attorney Ruth Lind's fees would be paid out of the Probate Estate, and Attorneys Barrus & Roberts would be paid out of the Trust administration).

~Please see additional page~

Second Additional Page 6, Chester & Lorene Beeler (Trust)

Case No. 10CEPR00880

Petitioner requests authorization to make the following preliminary distributions from the remaining cash on hand of \$245,697.08, which will be available for distribution after payment of creditors, trustees compensation, attorney's fees, and closing reserve (as noted above). Petitioner states the pecuniary gifts set forth in Section 4.03(b) of the Trust total \$300,000.00, and the Trustee would like to distribute \$240,000.00 or 80% of each bequest, as follows:

- 1. ANNA B. HINNLEY \$32,000.00
- 2. WEST PARK BAPTIST CHURCH \$80,000.00
- 3. BETTY RODGERS \$32,000.00
- 4. FRANCES ALVERS \$32.000.00
- 5. GAIL BROWN **\$32,000.00**
- 6. JOHN H. BEELER \$32,000.00

Petitioner states it is anticipated the Trust will receive in excess of \$100,000 from the Probate Estate, and the Trust is also receiving payments of \$1,166.52 on the promissory note asset; if the Trust receives the \$100,00, the Trust will have sufficient funds to pay the balance of the pecuniary gifts; after there are sufficient cash funds to pay the balance of the pecuniary gifts, the estate residue will be paid to the Fresno Rescue Mission; the Trustee anticipates it will distribute the remaining cash and the promissory note to the Fresno Rescue Mission and close the estate.

Petitioner prays for an Order:

- 1. Settling, allowing and approving the First Account and Report of the Petitioner as Trustee;
- 2. Confirming and approving all acts of and proceedings of the Petitioner as trustee relating to the matters set forth in the account;
- 3. Authorizing and directing the Trustee to pay the creditors the amounts identified in the Petition [noted above];
- 4. Authorizing and directing the Trustee to pay the attorney compensation and reimbursement of costs advanced through 12/31/2011; and
- 5. Allowing Petitioner to make preliminary distribution of pecuniary bequests in the amount of \$240,000.00 [as noted above].

Response and Objection to First Account of Trustee, Report of Trustee, Confirmation of Payment to Creditors and Allowance of Payment to Creditors, Fixing of Trustee's Compensation, and Approving Payment of Attorney's Fees and for Preliminary Distribution filed on 2/20/2012 by ANNA B. HINLEY and FRANCES ALBERS states:

- They are residents of the State of Maryland and are beneficiaries under Decedent's Will (Case 10CEPR00104) and of the Trust;
- As described by Petitioner Gail Brown, an agreement was reached by the parties participating in the settlement conference in the Probate matters that modify the distribution terms set forth in the Will and Trust; the agreement was a basis for allowing Pastor James Roberts to act as the Executor of the Estate;
- While the distribution terms under the agreement, which was never signed, have not been followed to date, the beneficiaries have agreed to allow the administration to progress through the preliminary distribution of the Probate estate and now of the Trust estate in order to move the administration of each matter along; however, as part of the agreement initially between the parties, the attorneys for the Executor were to be paid out of the Estate upon Court approval and attorneys for the Trustee were to be paid out of the Trust upon Court approval; the fees for the beneficiaries, Hinley and Albers, were to be paid equally from the Probate estate and the Trust estate;
- With that understanding, the *Declaration of Gary Bagdasarian in Support of Payment of Attorney's Fees on Behalf of Beneficiaries and Hinley and Albers* is attached, reflecting a total amount of \$35,280.00 and costs of \$455.71;
- Request is made that all costs and ½ of the fees in the amount of \$17,640.00 or a total of \$18,095.71 be paid from the Trust.

Esther Eaton (CONS/PE) Fanucchi, Edward L.

Case No. 10CEPR01090

Atty Atty Bagdasarian, Gary G.

Probate Status Hearing Re: Filing of Inventory and Appraisal

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		OFF CALENDAR
	=	
Cont. from	=	Inventory and Appraisal filed 2-9-12.
Aff.Sub.Wit.	=	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video	1	
Receipt		
CI Report		
9202		
Order		
Aff. Posting	_	Reviewed by: skc
Status Rpt	_	Reviewed on: 2-21-12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 7 - Eaton

Atty Atty

8

Palmira Marando (Trust)
Reich, Jeff (for Mike Montgomery) Saccheri, James L. (pro per Petitioner)
Accounting by James L. Saccheri

			JAMES L. SACCHERI is petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Account period: 6/20/2002 – 7/1/2008	
Coı	nt. from 011812 Aff.Sub.Wit.	2	Accounting - \$419,906.61 Beginning POH - \$299,293.44	Proof of service of the <i>Notice of</i>
√	Verified		Ending POH - \$299,293.44 Ending POH - \$53,417.09	Hearing indicates the Notice of Hearing was mailed on 2/9/12, 20
	Inventory			days notice and not 30 days as required by Probate Code §17203.
	PTC Not.Cred.			2. Need order.
✓	Notice of Hrg		Petitioner prays that the accounting for the period of 6/20/2002 – 7/1/2008	
✓	Aff.Mail	W/O	be settled, allowed and approved.	
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order	Χ		
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 2/21/12
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 8 – Marando

Atty

Kruthers, Heather H. (for Public Administrator)

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for (3) Distribution

DO	D: 10-11-10	PUBLIC ADMINISTRATOR, Executor with Full IAEA	NEEDS/PROBLEMS/COMMENTS:
		without bond, is Petitioner.	1. The Decedent's will appoints the
		Account period: 5-4-11 through 12-28-11	Public Administrator as Executor without bond. However, the Public Administrator requests
		Accounting: \$829,675.23	payment of a bond fee pursuant
L.		Beginning POH: \$782,675.23	to Probate Code §7621(d).
>	Verified	Ending POH: \$799,225.85 (cash)	The Court may require
>	Inventory		clarification regarding the
>	PTC	Executor (Statutory): \$19,428.41	applicability of this section when
~	Not.Cred.		specifically nominated without
>	Notice of	Executor (Extraordinary): \$248.00 (1 Deputy hour	bond pursuant to will.
	Hrg	@ \$96.00/hr and 2 Staff hours @ \$76.00/hr for	2. The Decedent's will specifically
>	Aff.Mail W	preparation of tax returns)	devises his estate as follows:
	Aff.Pub.		
	Sp.Ntc.	Attorney (Statutory): \$19,428.41	"to the County of Fresno, a Political Subdivision of the State
	Pers.Serv.		of California. It is my wish and
	Conf. Screen	Bond fee: \$1,382.48	desire that the property
>	Letters 5-4-1	1	distributed to said County of
	Duties/Supp	Closing: \$5,000.00	Fresno be used by its Parks and
	Objections	Cooks (200 FO /Filipp for the)	Recreation Division. In the use of said estate, it is my further wish
	Video	Costs: \$836.50 (Filing fee, etc.)	and desire that reasonable and
	Receipt	Distribution nursuant to Decedent's will	appropriate recognition be given
	CI Report	Distribution pursuant to Decedent's will:	to the memory of my father,
>	9202	County of Fresno: \$752,902.05	Floyd Lawrence and my mother, Mildred Lawrence, and to my
~	Order	County of 11C3no. \$752,502.05	memory."
			The proposed order simply distributes the funds to: "John A. Navarette, County Administrative Officer."
			The Court may require the order to contain more specific language.
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 2-21-12
	UCCJEA		Updates:
	Citation		Recommendation:
~	FTB Notice		File 9 - Lawrence
			9

Josephine Ellen Reis aka Josephine Reis (Estate) Case No. 11CEPR01051

Downing, Marcella (for Jimmie Dale Reis – son/Petitioner)

Amended Petition for Probate of Will and for Letters of Administration with Will Annexed; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DO	D: 9-27-11		JIMMIE DALE REIS, Son, is Petitioner and requests	NEEDS/PROBLEMS/COMMENTS:
			appointment as Administrator with Full IAEA without	
			bond.	1. Need Proof of publication.
			All heirs waive bond	Note: Petitioner estimates that the estate consists of annual income
✓	Aff.Sub.Wit. Verified		Full IAEA – Need publication	from real and personal property; however, no real or personal property is included as asset of the
	Inventory PTC		Decedent died intestate	estate. Examiner notes that because all heirs waive bond this is
	Not.Cred.		Residence: Laton, Fresno County, CA	not an issue at this time; however, the Court may require some
\	Notice of Hrg		Publication: Need publication	clarification as to the nature of the assets.
✓	Aff.Mail	W	Estimated Value of Estate:	
	Aff.Pub.	Χ	Annual income: \$255,000.00	Note: Petitioner originally requested to admit Decedent's will
	Sp.Ntc.			dated 12-10-77 to probate;
	Pers.Serv.		Probate Referee: Rick Smith	however, this amended petition
	Conf. Screen			indicates that Decedent died
✓	Letters			intestate.
✓	Duties/Supp			Examiner notes that the will
	Objections			devises the entire estate to
	Video			Decedent's five children, which is the same as intestate succession.
	Receipt			Petitioner's siblings consent to his
	CI Report			appointment and waive bond.
	9202			
✓	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 2-22-12
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 10 - Reis

Patricia A. Hausmann (Estate)

Bagdasarian, Gary (for Philip A. Hausmann
First Amended Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOI	D: 12-19-11		PHILIP A. HAUSMANN, Son, is Petitioner and	NEEDS/PROBLEMS/COMMENTS:
			requests appointment as Administrator with Full	·
			IAEA without bond.	Note: Petitioner was appointed Special Administrator on 1-12-12 for
				the purpose of accessing certain
			All heirs waive bond.	bank accounts to maintain payments
	Aff.Sub.Wit.			on Decedent's mortgage and vehicle
~	Verified		Full IAEA – Need publication	and pay funeral expenses. Special Administration expires 2-29-12.
	Inventory			rammonation expires 2 25 22.
	PTC		Decedent died intestate.	Note: Petitioner originally requested
	Not.Cred.		Residence: Fresno	to admit Decedent's will dated 10- 28-77 to probate; however, the will
_	Notice of		Publication: Need publication	is not self-proving and no subscribing
	Hrg		r abilication. Need publication	witnesses can be found.
~	Aff.Mail	W/O	Estimated value of estate:	Examiner notes that the will devises
	Aff.Pub.	Χ	Personal property: \$54,831.00	the entire estate to Decedent's two
	Sp.Ntc.		Real property: \$12,000.00 (Estimated value of	sons, which is the same as intestate
	Pers.Serv.		\$160,000.00 less encumbrance of \$148,000.00)	succession. Petitioner's brother
	Conf. Screen		Total: \$66,831.00	consents to his appointment and waives bond.
>	Letters		Darkete Defense Charles Diskert	
~	Duties/Supp		Probate Referee: Steven Diebert	1. Need proof of publication.
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 2-22-12
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 11B - Hausmann

Brenda L. Nelson aka Brenda Loretta Schulte (Det Succ) Case No. 12CEPR00044 Moore, Susan L. (for Shawna Robbins, La Ron Alipaz and Robbie Robbins – Petitioners)

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOI	D: 9-23-11		SHAWNA ROBBINS, LA RON ALIPAZ, daughters,	NEEDS/PROBLEMS/COMMENTS:
			and ROBBIE ROBBINS, son, are Petitioners.	
			40 days since DOD	
			No other proceedings	
	Aff.Sub.Wit.			
>	Verified		I&A: \$70,000.00	
	Inventory		Decedent died intestate	
	PTC		Decedent died intestate	
>	Not.Cred.		Petitioners request court determination that	
>	Notice of	W	Decedent's 100% interest in certain real	
	Hrg		property located in Fresno passes to them in	
	Aff.Mail		equal undivided one-third interests pursuant to	
	Aff.Pub.		intestate succession.	
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
>	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 2-22-12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 12 - Nelson

Campbell, Robert N (for Petitioner Janice Potter)

Petition to Compel Turnover of the Betty Ruth Cozby Trust Pursuant to Probate Code Section 16061.5 and for Damages and Attorney's Fees Pursuant to Probate Code Section 16061.9

			JANICE POTTER is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cox	nt. from		Petitioner states she is an heir at law, and believes she is a beneficiary of the Betty Ruth Cozby Trust.	Petitioner requests the court order the Trustee to
Col	Aff.Sub.Wit.	1	Betty Ruth Cozby died in April 2011.	turn over relevant information on the
√	Verified		Betty Cozby was unmarried and did not have	administration of the trust. Under Probate Code 16061
	Inventory		children, and her parents and siblings predeceased	the Trustee has a duty to
	PTC		her. Petitioner is a niece of Betty Cozby and heir at law under applicable Probate Code intestacy statutes.	report said information
	Not.Cred.		law under applicable 1 lobate code intestacy statutes.	regarding the administration of the trust
✓	Notice of Hrg		Petitioner believes Betty Cozby's friend, Edward D. Reimer, is the named successor Trustee of the Betty	to a beneficiary, relevant to the beneficiary's interest.
1	Aff.Mail	W/	Ruth Cozby Trust.	There has been no
	Aff.Pub.		Upon the death of Ruth Cozby the Trust became	determination at this point that Petitioner is a
	Sp.Ntc.		irrevocable. Petitioner states she requested orally,	beneficiary of the trust only
	Pers.Serv.		and then more formally, through counsel, a copy of	that she is an heir of the Trustor.
	Conf. Screen		the Trust. The formal request was made on	Trustor.
	Letters		8/17/2011. No response has been received to the	2. Need Order.
	Duties/Supp		request.	
	Objections		Probate Code §16061.5 provides that a trustee has a	
	Video		duty to provide a true and complete copy of the terms	
	Receipt		of an irrevocable trust, or irrevocable portion of a	
	CI Report		trust, to any beneficiary who requests it, and to any	
	9202		heir of a deceased settlor who requests it.	
	Order	Х		
	Aff. Posting		Wherefore, Petitioner seeks relief as follows:	Reviewed by: KT
	Status Rpt		1. For an Order compelling Edward D. Reimer to	Reviewed on: 2/22/12
	UCCJEA		provide full and complete copies of the Betty	Updates:
	Citation		Ruth Cozby trust, including any applicable	Recommendation:
	FTB Notice		schedules and amendments, if any;	File 13 - Cozby
			2. For an Order compelling turnover of relevant information on the administration of assets of the Trust pursuant to Probate Code section 16061;	
			3. That Edward D. Reimer be ordered to personally pay Petitioner's attorney's fees and costs in filing and prosecuting this petition.	
				12

14 Sunny J McLemore (Estate)

Case No. 10CEPR00792

Pro Per

McLemore, Patrick (Pro Per Petitioner, Administrator)

Petition for Final Distribution on Waiver of Accounting and for Allowance of Statutory Commissions (Prob. C. 10400-10406, 10904, 11600, 11642)

DOD: 8/7/2010 PATRICK McLEMORE, son		NEEDS/PROBLEMS/COMMENTS:	
	and Administrator, is Petitioner.	<u>Continued from 1/24/2012</u> . <i>Minute Order</i> states the matter is continued to 2/29/2012 at the request of the Petitioner.	
	Accounting is waived.	The following issues from the last hearing remain:	
Cont. from 012412 Aff.Sub.Wit.	I & A - \$145,000.00	1. Need Notice of Hearing of the Petition for Final Distribution on Waiver of Accounting, and proof of	
✓ Verified	POH - \$125,000.00	mailed service of 15 days' notice prior to hearing pursuant to Probate Code §§ 11000 and 11601 for the	
✓ Inventory ✓ PTC	Administrator - [\$5,260.00] (statutory)	following persons: Mark A. Troutman, son	
✓ Not.Cred. Notice of X	(300000025)	Cheryl A. Widener, daughter;	
Hrg Aff.Mail X	Distribution pursuant to	Peggy E. Turner, step-daughter;Kelly J. Basoco, step-daughter.	
Aff.Pub. Sp.Ntc.	intestate succession is to: • MARK A. TROUTMAN –	2. Need proof of mailed service of 15 days' notice prior to hearing of the <i>Notice of Hearing</i> along with a copy	
Pers.Serv. Conf. Screen	 1/5 interest in real property; CHERYL A. WIDENER – 1/5 interest in real property 	of the <i>Petition</i> for Union Bank per the <i>Request for Special Notice</i> filed 1/25/2011, pursuant to Probate Code §§ 1250, 1252, 11000, and 11601.	
Letters 101310	 PEGGY E. TURNER – 1/5 interest in real property PATRICK McLEMORE – 1/5 interest in real property KELLY J. BASOCO – 1/5 	3. Need proof of mailed service of 15 days' notice prior to hearing of the <i>Notice of Hearing</i> along with a copy of the <i>Petition</i> for Scott Weltman, Esq. (for Bank of America) per the <i>Request for Special Notice</i> filed 9/16/2010, pursuant to Probate Code §§ 1250, 1252, 11000, and 11601.	
Duties/S	interest in real property.	4. Pursuant to Local Rule 7.12.4, the Court will not order distribution of real property in undivided interests without the written consent of all	
Objections Video Receipt		distributees. Need written consent of: • Patrick McLemore, step-son;	
CI Report		Mark A. Troutman, son;	
✓ 9202 ✓ Order		 Cheryl A. Widener, daughter; Peggy E. Turner, step-daughter; Welly J. Passage step daughter; 	
		 Kelly J. Basoco, step-daughter. 5. Statutory fee base does not include the \$3,000.00 loss on sale of Decedent's automobile. Correct statutory fee calculates as \$5,260.00 when the loss is taken into account as required by Probate Code § 10800. Proposed order does not contain a finding for award of statutory commissions to Petitioner as is requested in the <i>Petition</i>. Need revised proposed order awarding the correct amount of statutory compensation to the Petitioner as Administrator. 	
Aff. Posting		Reviewed by: LEG	
Status Rpt		Reviewed on: 2/17/12	
UCCJEA		Updates: Recommendation:	
Citation ✓ FTB Notice	-	File 14 - McLemore	

Alcantar, Violeta Maria (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 7 months		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
DOB: 07/27/11		VIOLETA ALCANTAD meternel	Need proof of personal service at
-		VIOLETA ALCANTAR, maternal grandmother, is Petitioner.	least 15 days before the hearing of
—		grandmother, is returbler.	Notice of Hearing with a copy of the
		Father: CHRISTIAN LOPEZ	Petition for Appointment of
Cor	nt. from		<i>Guardian of the Person</i> <u>or</u> Consent
	Aff.Sub.Wit.	Mother: FLOR VIOLETA SERRATOS –	and Waiver of Notice or Declaration
✓	Verified	consent and waiver of notice filed 02/01/12	of Due Diligence for:
	Inventory		- Christian Lopez (father)
	PTC	Paternal grandfather: JOE LOPEZ – served	
	Not.Cred.	by mail 01/27/12 Paternal grandmother: TERESA LOPEZ –	
✓	Notice of	served by mail 01/27/12	
	Hrg	served by man 01/27/12	
✓	Aff.Mail	Maternal grandfather: RIGOBERTO	
	Aff.Pub.	SERRATOS – served by mail 01/27/12	
	Sp.Ntc.		
	Pers.Serv. x	Petitioner states that the mother is only 16	
✓	Conf. Screen	and is not exhibiting the maturity necessary	
✓	Letters	to properly care for her son. Petitioner states that she has been the primary care provider	
✓	Duties/Supp	and has supported the baby since birth.	
	Objections	Petitioner states that the mother has	
	Video	threatened to run away and take the baby	
	Receipt	with her. Petitioner states that the father is	
✓	CI Report	18 and currently on probation for burglary.	
	9202	Father has a history of substance abuse and	
✓	Order	arrest and is not able to properly care for the	
	Aff. Posting	child.	Reviewed by: JF
	Status Rpt	Court Investigator Julie Negrete's report	Reviewed on: 02/22/12
✓	UCCJEA	was filed 02/14/12.	Updates:
	Citation		Recommendation:
	FTB Notice		File 15 - Lopez

Atty Carmickle, Dennis (pro per – paternal step-grandfather)
Atty Carmickle, Kimberly Rene (pro per – paternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 4			TEMPORARY EXPIRES 02/29/12	NEEDS/PROBLEMS/COMMENTS:
DOB: 08/23/07 Cont. from			KIMBERLY CARMICKLE and DENNIS CARMICKLE, paternal grandmother and step-grandfather, are Petitioners.	 Petition is missing Child Information Attachment (Form GC-21(CA)). Need CI report and clearances. (CI to provide).
	Aff.Sub.Wit.		Father: KEVIN ROSS WOOLF – consent	. ,
✓	Verified		and waiver of notice filed 12/28/11	
	Inventory		A A GERRAL M WOOLF	
	PTC		Mother: SERENA M. WOOLF – consent	
	Not.Cred.		and waiver of notice filed 12/28/11	
✓	Notice of		Paternal grandfather: GARY S. WOOLF –	
	Hrg		declaration of due diligence filed 12/28/11	
✓	Aff.Mail	w/		
	Aff.Pub.		Maternal grandfather: RALPH J.	
	Sp.Ntc.		CALDERON – consent and waiver of	
	Pers.Serv.	n/a	notice filed 12/28/11	
✓	Conf. Screen		Maternal grandmother: GLORIA FLORES	
✓	Letters		– consent and waiver of notice filed 12/28/11	
✓	Duties/Supp		12/20/11	
	Objections		Petitioners state that the child has resided	
	Video		with them since birth and they have played	
	Receipt		an active role with their grandson.	
	CI Report	Х		
	9202		Court Investigator Jennifer Young's	
✓	Order		report was filed – NEED REPORT.	
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 02/22/12
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 16A - Woolf

16A

Thomas, Tracy Janine (pro per Petitioner/maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)					
Izaiah age: 3 years	TEMPORARY EXPIRES ON 2/29/12	NEEDS/PROBLEMS/COMMENTS:			
DOB: 8/24/2008 Adrian age: 2 years DOB: 10/4/2009	TRACY THOMAS, maternal grandmother,	Minute Order from the hearing on the temporary petition dated 1/11/12 states the			
	is Petitioner.	mother and father are to be given notice for the hearing on the general petition.			
Cont. from	Father: C.J. BRYANT – declaration of due diligence filed 01/10/12	1. Need Notice of Hearing.			
Aff.Sub.Wit. ✓ Verified	Mother: GINA McADAMS – declaration of	2. Need proof of personal service of the			
Inventory	due diligence filed 01/10/12	Notice of Hearing along with a copy of the Petition or Consent and Waiver of			
PTC Not.Cred.	Paternal grandparents: Unknown	Notice on: a. C. J. Bryant (father)			
Notice of X Hrg	Maternal grandfather: Not listed	b. Gina McAdams (mother)			
Aff.Mail X	Petitioner states that both of the children	3. Need proof of service of the <i>Notice of</i>			
Aff.Pub.	have lived with her since birth with their	Hearing along with a copy of the Petition or Consent and Waiver of			
Sp.Ntc.	parents in and out of their lives. Petitioner	Notice or Declaration of Due Diligence			
Pers.Serv. X	states that she wants to provide a safe and	on:			
✓ Conf. Screen	stable home for the children.	a. Paternal grandparents b. Maternal grandfather			
✓ Letters					
√ Duties/Supp		Court Investigator Samantha Henson to			
Objections		provide:			
Video Receipt		1. Court Investigator's Report			
CI Report X		2. Clearances			
9202					
✓ Order					
Aff. Posting		Reviewed by: KT			
Status Rpt		Reviewed on: 2/22/12			
✓ UCCJEA		Updates:			
Citation		Recommendation:			
FTB Notice		File 17 - Bryant			

Cariaga, Joel D. (Pro Per – Spouse – Petitioner)

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C 1820, 1821, 2680-2682)

Age: 49			NO TEMPORARY REQUESTED	NE	EDS/PROBLEMS/COMMENTS:
DOB: 4-18-62				1.	Need Notice of Hearing.
	Aff.Sub.Wit.		JOEL D. CARIAGA , Spouse, is Petitioner and requests appointment as conservator of the person with medical consent powers and as conservator of the estate.	2.	Need proof of service of Notice of Hearing with a copy of the Petition on all relatives at least 15 days prior to the hearing per Probate Code §1822 and Cal. Rule of Court 7.51.
>	Verified		Voting rights affected		Note: The petition does not list any
	Inventory				relatives; however, the Court
	PTC		A Capacity Declaration was filed 1-20-12.		Investigator's report mentions that the proposed conservatee has
	Not.Cred.				children, siblings, and possibly
	Notice of Hrg	Х	Estimated Value of Estate: Not provided		parents (the children stay with their grandparents).
	Aff.Mail	Χ	Petitioner does not state a reason for the		Note: See Cal. Rule of Court 7.51
	Aff.Pub.		conservatorship in the Petition. (#5.c.(1) is		regarding direct notice to minors with
	Sp.Ntc.		blank and there is no attachment.)		copy to adult with whom they reside.
	Pers.Serv.	Χ	Court Investigator Julie Negrete filed a report	3.	Need Citation.
~	Conf. Screen		on 2-16-12.	4.	Need proof of personal service of
>	Letters		0.1.2.10.12.1		Citation with a copy of the Petition at least 15 days prior to the hearing per
>	Duties/Supp				Probate Code §1824 on the proposed
	Objections				conservatee Perla A. Cariaga.
	Video	Χ		5.	Need video receipt pursuant to Local
	Receipt				Rule 7.15.8.
>	CI Report			6.	Need clarification as to the nature and value of the assets for bonding
	9202				purposes pursuant to Probate Code
•	Order				§2320(c)(4) and Cal. Rule of Court 7.207.
	Aff. Posting			Rev	viewed by: skc
	Status Rpt			Rev	viewed on: 2-22-12
	UCCJEA				dates:
	Citation	Χ			commendation:
	FTB Notice			File	e 18 - Cariaga

Atty Harris, James Earl Jr. MD (pro per – half-brother/Petitioner)
Atty Harris, Rosina Maria (pro per – half-sister in law/Petitioner)

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Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Jammy, 9	NICEDS (DDODLEMS (COMMENTS)		
DOB: 08/14/02		GENERAL HEARING 04/23/12	NEEDS/PROBLEMS/COMMENTS:
		JAMES EARL HARRIS, JR., M.D. and	
Jarvis, 8 DOB: 01/11/04		ROSINA MARIA HARRIS, half-brother	
505. 01/11/04		and half-sister in law, are Petitioners.	
Court from		Father: JAMES EARL HARRIS, SR. –	
Cont. from	.	deceased	
Aff.Sub.Wit	:.		
✓ Verified		Mother: RAJANNE ANGELIC	
Inventory		JEFFERSON – personally served 02/14/12	
PTC		Determed aroundfoth are HENDY DI ACU	
Not.Cred.		Paternal grandfather: HENRY BLACK – deceased	
✓ Notice of		Paternal grandmother: GRACIE MAE	
Hrg		HARRIS – deceased	
Aff.Mail			
Aff.Pub.		Maternal grandparents: UNKNOWN	
Sp.Ntc.			
✓ Pers.Serv.		Petitioners state that the children's father	
✓ Conf. Scree	n	died unexpectedly on 02/16/12. Their father	
✓ Letters		had sole custody of both of the children as	
✓ Duties/Sup	р	the mother is not fit to provide a safe home	
Objections	-	and has been charged with child abuse in the past and currently has charges against her for	
Video		assault with a deadly weapon. Since the	
Receipt		father's death, the children have been in their	
CI Report		mother's care. Petitioners state that they can	
9202		provide the children with a safe and loving	
✓ Order		home and provide them with a better life.	
Aff. Posting	;	Petitioners state that they fear for the	Reviewed by: JF
Status Rpt		children's safety while in the care of their	Reviewed on: 02/22/12
✓ UCCJEA		mother due to her history.	Updates:
Citation			Recommendation:
FTB Notice			File 19 – Harris & Jefferson

Richard Daniel Reyes III and Terrance Anthony Reyes (GUARD/P)

Case No. 12CEPR00151

Atty Davis, Deborah (pro per – maternal great-aunt/Petitioner)

20

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250				
Richard, 3	GENERAL HEARING 04/17/12	NEEDS/PROBLEMS/COMMENTS:		
DOB: 11/14/08				
Terrance, 3	DEBORAH DAVIS, maternal great-aunt, is	1. Need Notice of Hearing.		
DOB: 11/14/08	Petitioner.	2. Need proof of personal service at		
		least 5 court days before the		
	Father: UNKNOWN	hearing of <i>Notice of Hearing</i> with a		
Cont. from		copy of the <i>Temporary</i> Guardianship Petition <u>or</u> Consent		
Aff.Sub.Wit.	Mother: CASSANDRA ROBLES – consent	and Waiver of Notice or Declaration		
✓ Verified	and waiver of notice filed 02/14/12	of Due Diligence for:		
Inventory	Paternal grandparents: UNKNOWN	- Father (unknown)		
PTC	=			
	Maternal grandfather: PETE ROBLES			
Not.Cred.	Maternal grandmother: TRACEY BEHN			
Notice of	x			
Hrg	Petitioner states that the mother is suffering			
Aff.Mail	from serious health conditions that are			
Aff.Pub.	limiting her ability to walk and take care of			
Sp.Ntc.	herself. A family friend who had been			
Pers.Serv.	assisting the mother left and the mother is			
✓ Conf. Screen	not able to care for them herself. Petitioner			
✓ Letters	states that the children moved in with her on 02/06/12. Mother is in agreement with the			
✓ Duties/Supp	guardianship due to her medical problems.			
Objections	guardiansmp due to her medical prociems.			
Video				
Receipt				
CI Report				
9202				
✓ Order				
Aff. Posting		Reviewed by: JF		
Status Rpt		Reviewed on: 02/22/12		
✓ UCCJEA		Updates:		
Citation		Recommendation:		
FTB Notice		File 20 - Reyes		

21 Jaylen Ortiz, Agustin Leon, Alfredo Leon, and Alyssa Ortiz (GUARD/P) Case No. 12CEPR00145

Atty Garcia, Elsa (pro per – paternal aunt/Petitioner for Alfredo/Alyssa)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Alfredo, 5			GENERAL HEARING 04/11/12	NEEDS/PROBLEMS/COMMENTS:
DOB: 08/24/06 Alyssa, 9 DOB: 02/11/03			ELSA GARCIA, paternal aunt, is Petitioner.	This Petition pertains to Alfredo and Alyssa Ortiz only. A Petition guardianship of
Cont. from			Father: JOSE AGUSTIN LEON – incarcerated	Jaylen and Agustin by another paternal aunt, Guadalupe Villagomez was heard on 02/27/12.
Aff.Sub.Wit.			N. J. DOGDANA ODBYZ	1. UCCJEA is incomplete. Need
_	Verified		Mother: ROSEANA ORTIZ – currently	children's residence address from
Ě			incarcerated	birth to 02/03/12.
	Inventory PTC		Paternal grandfather: AGUSTIN LEON	2. Need Notice of Hearing.
	_		Paternal grandmother: PETRA GARCIA	3. Need proof of personal service at
	Not.Cred.		AUMADA	least 5 court days before the
	Notice of Hrg	Х		hearing of Notice of Hearing with a copy of the Petition for Temporary
	Aff.Mail		Maternal grandfather: DECEASED	Guardianship or Consent and
			Maternal grandmother: IRENE ORONA	Waiver of Notice <u>or</u> Declaration of
	Aff.Pub.		C'L' A CHCTIN I FON LAVI EN	Due Diligence for:
	Sp.Ntc.		Siblings: AGUSTIN LEON, JAYLEN ORTIZ	- Jose Agustin Leon (father)
	Pers.Serv.	Х	OKTIZ	- Roseana Ortiz (mother)
√	Conf. Screen		Petitioner states that both parents are	
√	Letters		incarcerated. The children had been living	
√	Duties/Supp		with their mother prior to her being arrested.	
	Objections		The mother's home was very dirty, with no	
	Video		gas and no food in the refrigerator. The	
	Receipt		mother was evicted from her home for not	
	CI Report		paying the rent.	
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 02/17/12
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 21 – Ortiz & Leon